

What is claimed is:

1. A method for managing sales activities, said method comprising the steps of:
 - storing, in a database, a plurality of activity item information
 - 5 sets respectively representing each of a plurality of sales activity items included in sales activities for achieving a business transaction, in association with each of a plurality of stages according to which the plurality of sales activity items are classified based on progress of the business transaction;
 - 10 retrieving one or more activity item information sets stored in the database, in response to an instruction from an operator of a terminal; and
 - controlling a display device of the terminal to display both of the one or more retrieved activity information sets and information
 - 15 representing one of the plurality of stages which corresponds to the one or more activity information sets.
2. The method according to claim 1, further including the step of
 - storing, in the database, activity item evaluation information
 - 20 representing whether each of the plurality of activity items has been attained, in association with each of the plurality of activity item information sets.
3. The method according to claim 1, further including the step of
 - 25 controlling the display device of the terminal to display the one

or more activity item information sets in association with the activity item evaluation information, by stage.

4. The method according to claim 2, further including the step of
5 storing, in the database, in a case where the activity item evaluation information represents that each of the activity items each associated with one of the plurality of stages has been attained, stage completion information representing that the one of the plurality of stages has been completed.
- 10 5. The method according to claim 2, further including the step of
storing, in the database, information representing a completion scheduled date of each of the plurality of stages.
- 15 6. The method according to claim 5, further including the step of
storing, in the database, in a case where the activity item evaluation information represents that one of the activity items each corresponding to one of the stages has not yet been attained even after the completion scheduled date has passed, information
20 representing that the business transaction is delayed at one of the plurality of stages.
- 25 7. The method according to claim 5, further including the step of
displaying information representing the completion scheduled date of each of the stages and information representing an attainment status of each of the stages, in association with each of the stages,

and

wherein the information representing the attainment status represents

in a case where at least one activity item information set
5 represents that one of the activity items each corresponding to one of the stages has not yet been attained, that the business transaction is being delayed at one of the plurality of stages, and

in a case where the activity item information sets respectively represent that the activity items each corresponding to one of the
10 stages have been attained, that the one of the plurality of stages has been completed.

8. The method according to claim 1, further comprising the step of

controlling the display device of the terminal to display a
15 message for suggesting the operator to change an action of the activity item evaluation information representing that one of the activity items has not yet been attained, when changing the activity item evaluation information corresponding to one of the activity items in association with a first stage of the plurality of stages so as
20 to represent that the one of the activity items has been attained, in a case where the activity item evaluation information represents that one of the activity items corresponding to a second stage of the plurality of stages where the business transaction has been progressed to a level lower than a level of progression at the first stage has not
25 yet been attained.

9. The method according to claim 2, further including the
step of
storing, in the database, the activity item information sets in
association with information representing the business transaction,
5 according to each target business transaction having business
activities including the activity items shown in the activity item
information.
10. The method according to claim 9, further including the
step of
10 storing, in the database, a scenario of the sales activities toward
a customer of each target business transaction, in association with
information representing the customer.
11. A sales-activity management system comprising:
a processor which executes a process for managing sales
15 activities;
a storage section which stores information necessary for
executing the process; and
a timer which supplies said processor with time information, and
wherein said processor
20 stores, in a database, a plurality of activity item information
sets respectively representing a plurality of activity items included in
the sales activities performed for achieving a business transaction, in
association with each of a plurality of stages according to which the
plurality of sales activities are classified based on progress of the
25 business transaction,

retrieving one or more activity item information sets of the plurality of activity item information sets stored in the database, in response to an instruction from an operator of a terminal, and

controlling a display device of the terminal to display both of
5 the one or more retrieved activity information sets and information representing one of the plurality of stages which corresponds to the one or more activity information sets.

12. The sales-activity management system according to claim
11, wherein

10 said processor further stores, in the database, activity item evaluation information representing whether each of the plurality of activity items has been attained, in association with each of the activity item information sets.

13. The sales-activity management system according to claim
15 12, wherein

said processor controls the display device of the terminal to display the one or more activity item information sets in association with the activity item evaluation information, by stage.

14. The sales-activity management system according to claim
20 12, wherein

said processor stores, in the database , in a case where the activity item evaluation information represents that each of the activity items each associated with one of the plurality of stages has been attained, stage completion information representing that the one
25 of the plurality of stages has been completed.

15. The sales-activity management system according to claim 12, wherein
said processor stores, in the database, information representing a completion scheduled date of each of the plurality of stages.
- 5 16. The sales-activity management system according to claim 15, wherein
said processor
stores, in the database, in a case where the activity item
evaluation information represents that one of the activity items each
10 corresponding to one of the stages has not yet been attained even
after the completion scheduled date shown in date/time information
sent from said timer has passed, information representing that the
business transaction is delayed at one of the plurality of stages.
17. The sales-activity management system according to claim
15 11, wherein
the database is included in said storage section.
18. A sales-activity management system comprising:
sales-activity-information storage means for storing, in a
database, sales activity information regarding sales activities
20 performed for achieving a business transaction;
sales-activity-information retrieval means for retrieving the sales
activity information stored in the database; and
sales-activity-information display means for displaying the
retrieved sales activity information on a display device, and
25 wherein said sales-activity-information storage means stores, in

the database, activity item information representing the sales activities, in association with a plurality of stages according to which the sales activities are classified based on progress of the business transaction,

5 said sales-activity-information retrieval means retrieves the activity item information stored in the database, in response to an instruction of an operator of a terminal, and

 said sales-activity-information display means controls the display device of the terminal to display the activity item information
10 retrieved by said sales-activity-information retrieval means, in association with information representing each of the stages corresponding to the activity item information.

19. A computer readable recording medium storing a program for controlling a computer to execute the steps of:

15 storing, in a database, a plurality of activity item information sets respectively representing each of a plurality of sales activity items included in sales activities for achieving a business transaction, in association with each of a plurality of stages according to which the plurality of sales activity items are classified based on
20 progress of the business transaction;

 retrieving one or more activity item information sets stored in the database, in response to an instruction from an operator of a terminal; and

 controlling a display device of the terminal to display both of the
25 one or more retrieved activity information sets and information

representing one of the plurality of stages which corresponds to the one or more activity information sets.

20. The computer readable recording medium according to claim 19, said program further controlling a computer to execute the
5 step of

storing activity item evaluation information representing whether each of the plurality of activity items has been attained, in association with each of the activity item information sets.

ABSTRACT OF THE DISCLOSURE

An SFA server stores a customer database. The customer database stores: a customer name and/or staff name of corresponding customer; a business transaction of the customer; detail information
5 representing business activities for achieving the business transaction, a completion scheduled date, and an actual completion date; information for determining whether each maturity stage has been attained; a check flag representing whether a maturity item has been attained, and a strategic scenario showing some plans for the business
10 transaction toward the customer. Each of sales-staff terminal inputs the above data, stores the input data, and displays the detail information of the business activities in chronological order of the scheduled dates in the form of a list. The displayed data can be viewed from a manager terminal as well. An SCM server estimates
15 the demand for products, based on the check flag stored in the customer database.

FIG.1

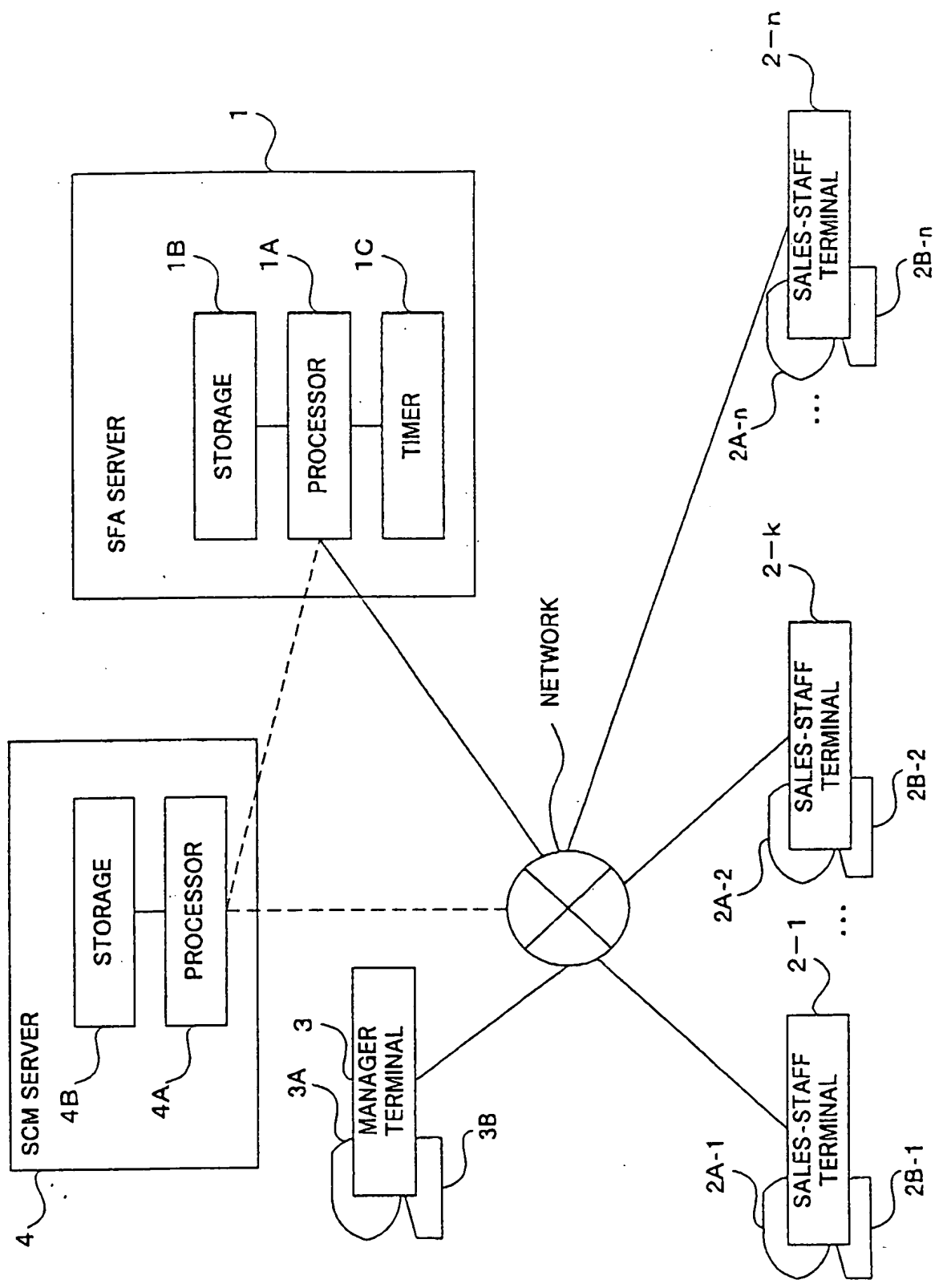


FIG. 2

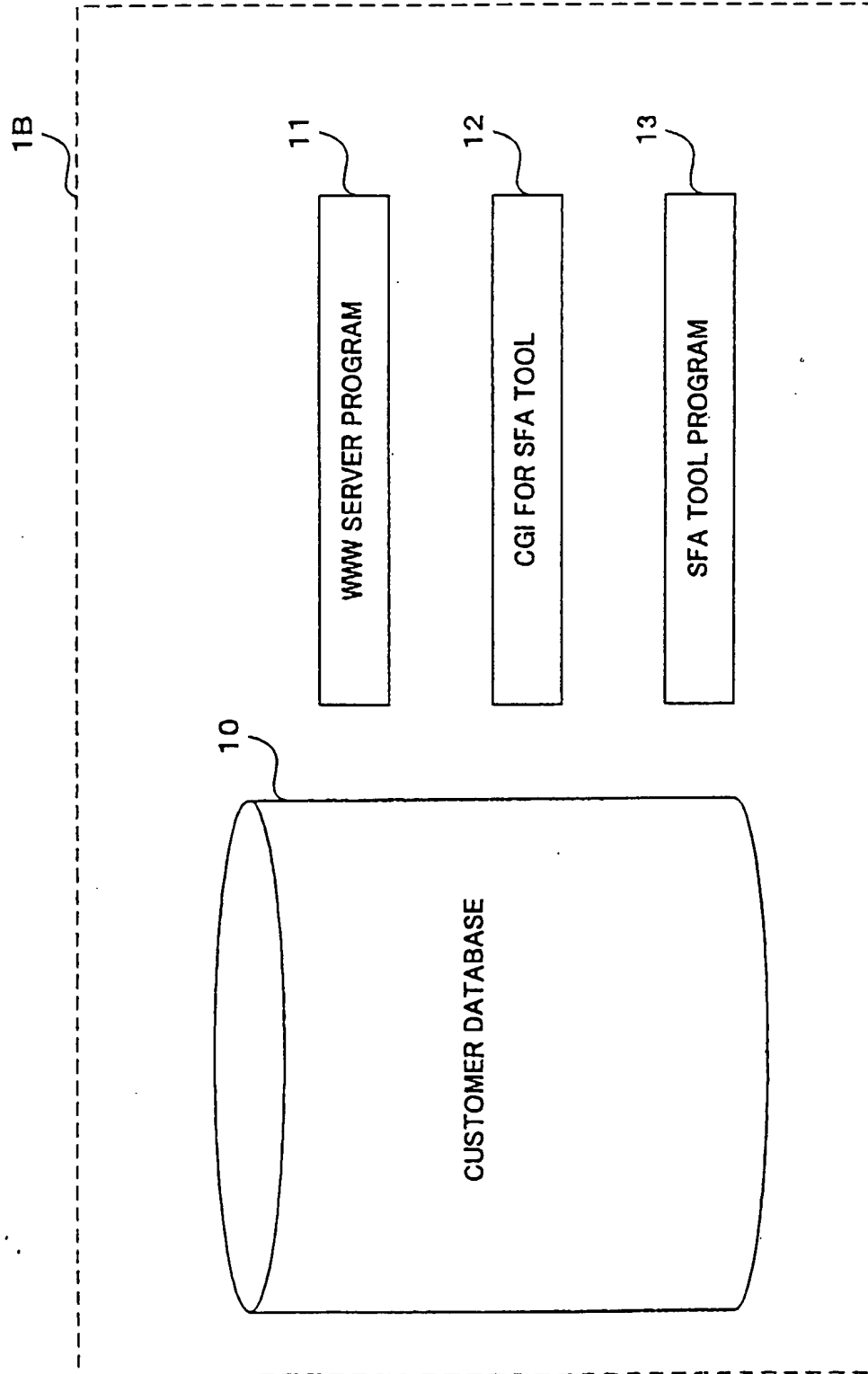


FIG. 3

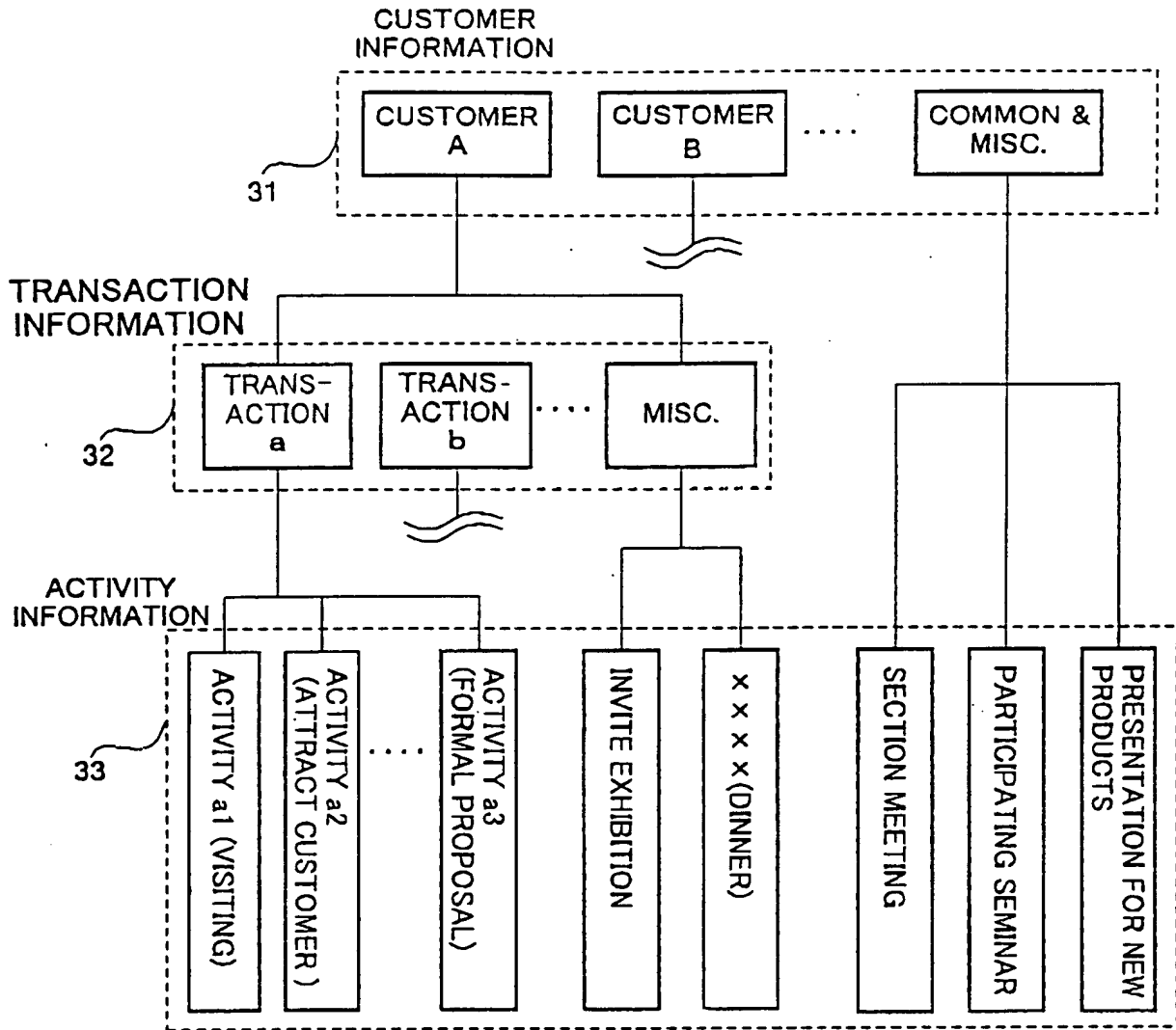


FIG. 4

41 42 43 44 45 46

CUSTOMER SECTION STAFF TRANSACTION ACTIVITY CALENDAR

SELECTION OF TARGET ITEM → SPECIFY TAB OF TARGET ITEM.

SELECT

NAME 47

PASSWORD 48

FIG. 5

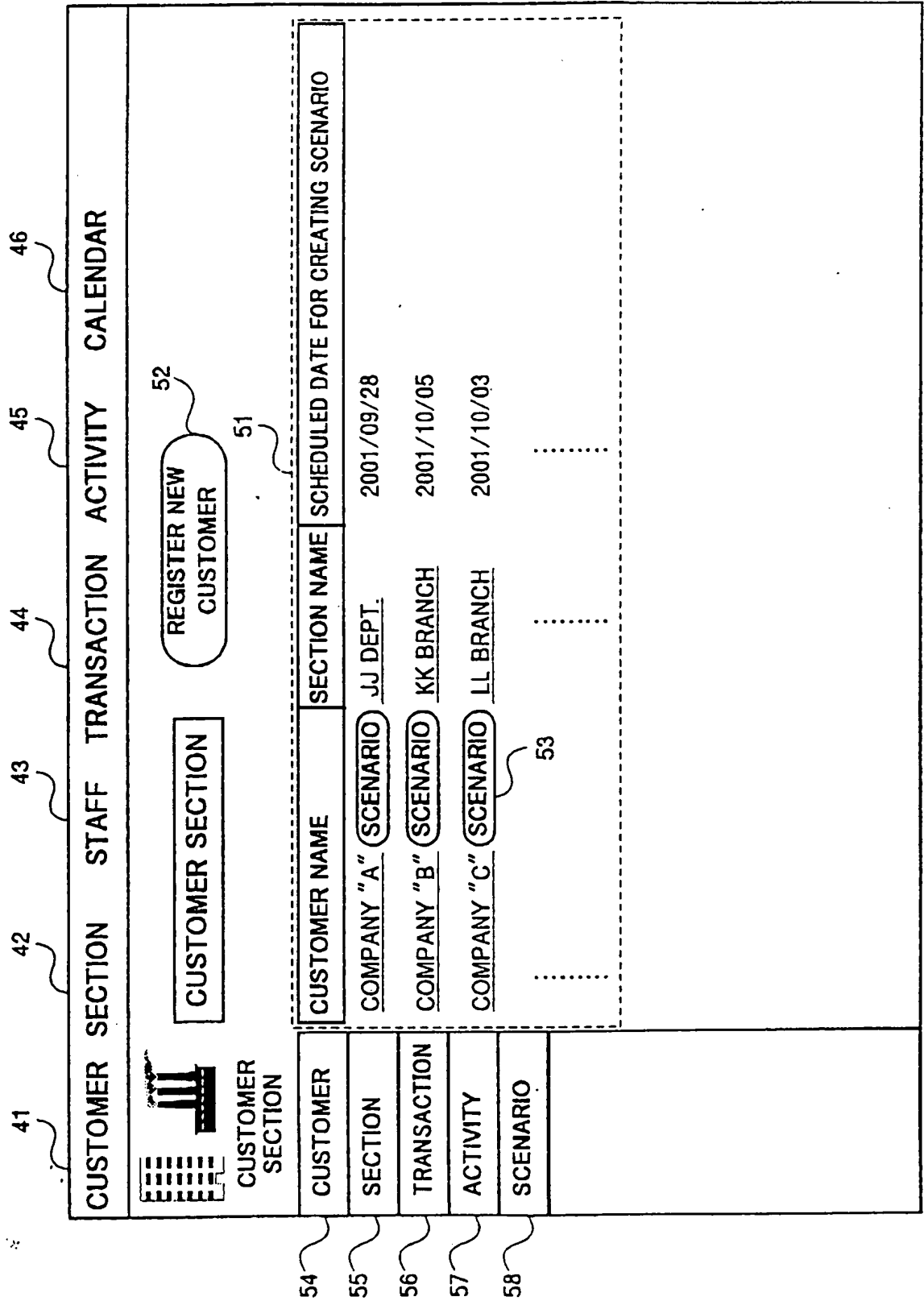


FIG. 6

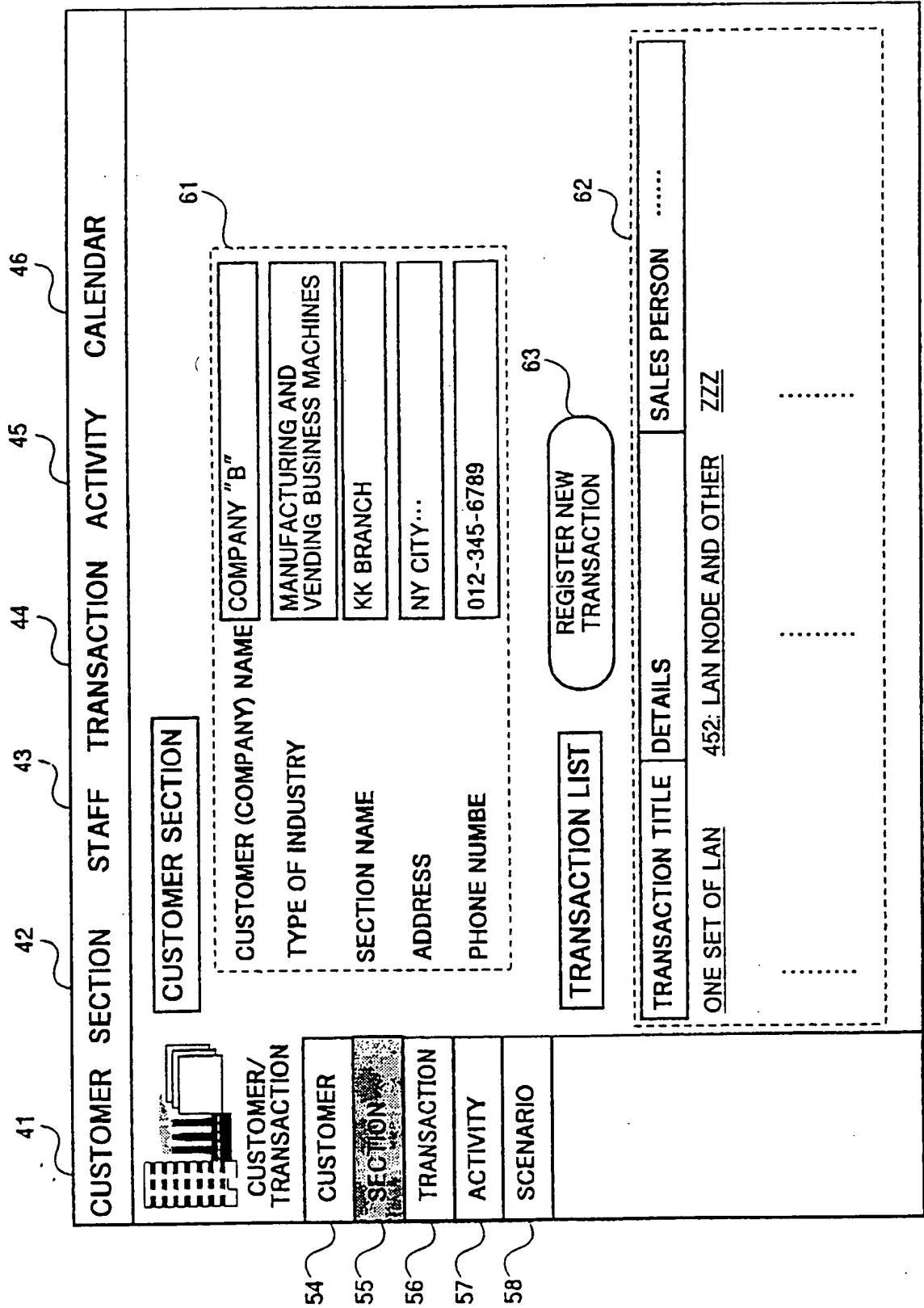


FIG. 7

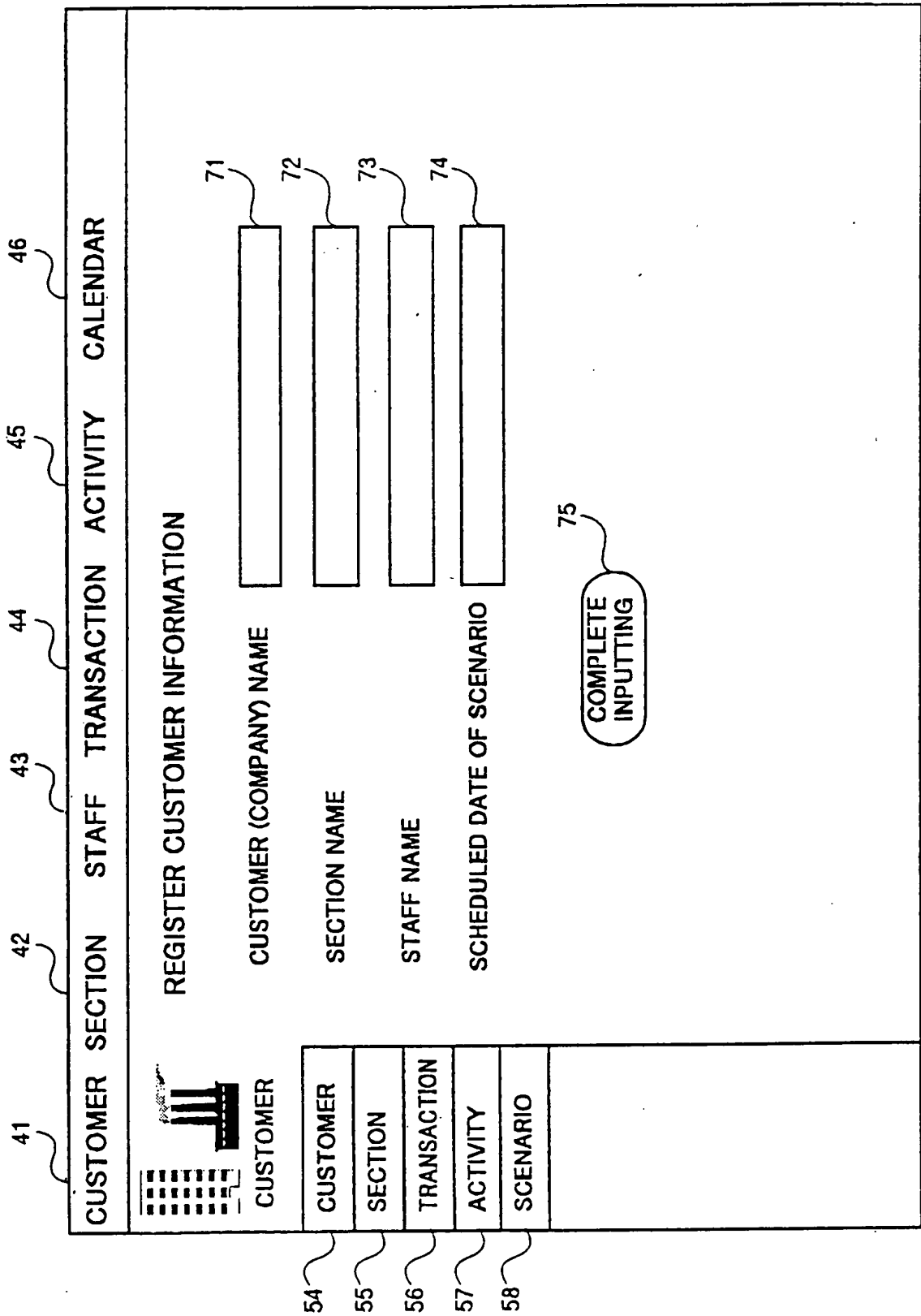


FIG. 8

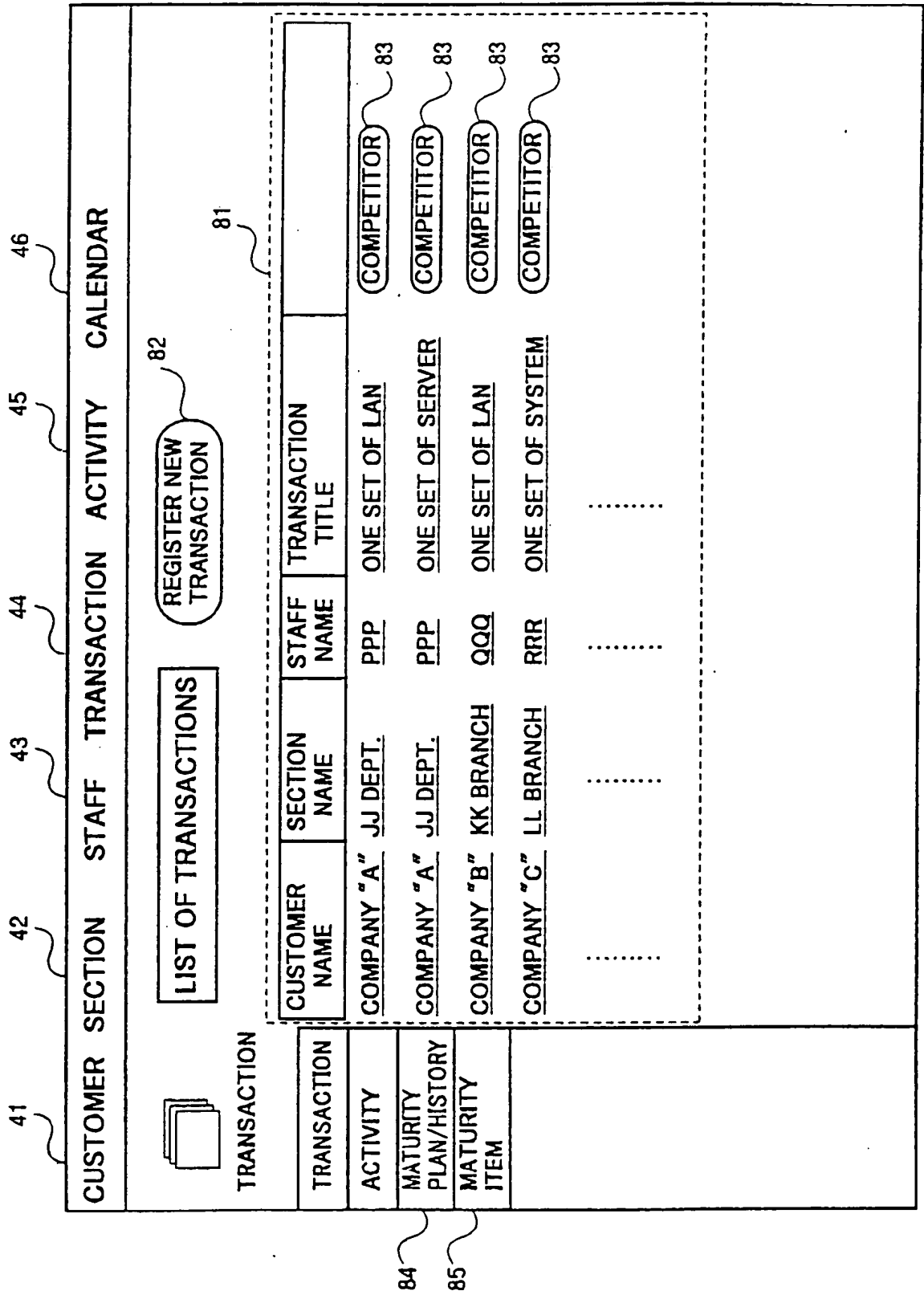


FIG. 9

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CUSTOMER	SECTION	STAFF	TRANSACTION	ACTIVITY	CALENDAR																														
<div style="margin-bottom: 5px;">  </div> <div>TRANSACTION</div> <div>TRANSACTION</div> <div>ACTIVITY</div> <div>MATURITY PLAN/HISTORY</div> <div>MATURITY ITEM</div>	<div style="border: 1px dashed black; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <div style="margin-bottom: 10px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">TRANSACTION</div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">CUSTOMER NAME</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">SECTION NAME</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">STAFF NAME</div> </div> <div style="width: 50%;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">COMPANY "B"</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">KK BRANCH</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">YYY</div> </div> </div> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">TRANSACTION TITLE</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">SALES STAFF NAME</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">MATURITY STAGE</div> </div> <div style="width: 50%;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">ONE SET OF LAN</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">ZZZ</div> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">05-UNDERSTANDING NEEDS ...</div> </div> </div> </div> </div> <div style="margin-top: 10px;"> <div style="border: 1px solid black; padding: 2px; margin-bottom: 5px;">MATURITY PLAN/HISTORY</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">MATURITY</th> <th style="width: 20%;">SCHEDULED DATE</th> <th style="width: 40%;">COMPLETION DATE</th> </tr> </thead> <tbody> <tr><td>01-MAKING CONNECTION</td><td>2001/08/01</td><td>2001/08/01</td></tr> <tr><td>02-MAKING RELATION</td><td>2001/08/06</td><td>2001/08/06</td></tr> <tr><td>03-EXAMINING CIRCUMSTANCE</td><td>2001/08/10</td><td>2001/08/10</td></tr> <tr><td>04-ATTRACTING CUSTOMER</td><td>2001/08/21</td><td>2001/08/22</td></tr> <tr><td>05-UNDERSTANDING NEEDS</td><td>2001/08/27</td><td>2001/08/27</td></tr> <tr><td>06-PICKING UP PROBLEMS</td><td>2001/08/31</td><td></td></tr> <tr><td>07-FORMAL PROPOSAL</td><td>2001/09/07</td><td></td></tr> <tr><td>08-CLEARING OBSTRUCTIVES</td><td>2001/09/12</td><td></td></tr> <tr><td>09-ENTERING INTO CONTRACT</td><td>2001/09/14</td><td></td></tr> </tbody> </table> </div> </div> </div>					MATURITY	SCHEDULED DATE	COMPLETION DATE	01-MAKING CONNECTION	2001/08/01	2001/08/01	02-MAKING RELATION	2001/08/06	2001/08/06	03-EXAMINING CIRCUMSTANCE	2001/08/10	2001/08/10	04-ATTRACTING CUSTOMER	2001/08/21	2001/08/22	05-UNDERSTANDING NEEDS	2001/08/27	2001/08/27	06-PICKING UP PROBLEMS	2001/08/31		07-FORMAL PROPOSAL	2001/09/07		08-CLEARING OBSTRUCTIVES	2001/09/12		09-ENTERING INTO CONTRACT	2001/09/14	
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09-ENTERING INTO CONTRACT	2001/09/14																																		

FIG.10


41	42	43	44	45	46
CUSTOMER	SECTION	STAFF	TRANSACTION	ACTIVITY	CALENDAR
<div>84</div> <div>85</div>		<div>101</div> <div>TRANSACTION</div> <div>CUSTOMER NAME</div> <div>COMPANY "B"</div> <div>TRANSACTION TITLE</div> <div>ONE SET OF LAN</div> <div>SECTION NAME</div> <div>KK BRANCH</div> <div>SALES STAFF NAME</div> <div>ZZZ</div> <div>STAFF NAME</div> <div>YYY</div> <div>MATURITY STAGE</div> <div>05-UNDERSTANDING NEEDS ...</div>			
	TRANSACTION	<div>102</div> <div>MATURITY ITEM</div> <div>MATURITY STAGE 2- MAKING RELATION</div> <div>- MAKE NEW CONTACTS WITH IMPORTANT PERSON(S) OF CUSTOMER</div> <div>- FIND OUT DECISION-MAKER IN CHARGE OF PURCHASING GOODS AND KEY-PERSON IN AUTHORITY</div> <div>- KEEP IN TOUCH WITH KEY-PERSON</div> <div>NOTE: NOTHING PARTICULARLY</div> <div>103</div> <div>103</div> <div>103</div>			
	ACTIVITY				
	MATURITY PLAN/HISTORY				
	MATURITY ITEM				

FIG.11

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CUSTOMER	SECTION	STAFF	TRANSACTION	ACTIVITY	CALENDAR																																																	
<div style="display: flex; justify-content: space-around; align-items: center;"> <div style="text-align: center;"> <div style="border: 1px solid black; padding: 2px;">LIST OF ACTIVITIES</div> </div> <div style="text-align: center;"> <div style="border: 1px solid black; border-radius: 15px; padding: 5px; display: inline-block;">REGISTER NEW ACTIVITY</div> </div> </div>																																																						
<div style="border: 1px dashed black; padding: 10px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">DETAILS OF ACTIVITY</th> <th style="width: 10%;">MATURITY STAGE</th> <th style="width: 15%;">SCHEDULED DATE</th> <th style="width: 10%;">TIME</th> <th style="width: 15%;">CUSTOMER NAME</th> <th style="width: 10%;">SECTION NAME</th> <th style="width: 15%;">TRANSACTION TITLE</th> </tr> </thead> <tbody> <tr> <td><u>CREATE PROPOSAL</u></td> <td>07</td> <td>2001/08/20</td> <td>10:00</td> <td><u>COMPANY "A"</u></td> <td><u>JJ DEPT.</u></td> <td><u>ONE SET OF LAN</u></td> </tr> <tr> <td><u>PR OF NEW PRODUCT</u></td> <td>04</td> <td>2001/08/20</td> <td>15:00</td> <td><u>COMPANY "A"</u></td> <td><u>JJ DEPT.</u></td> <td><u>ONE SET OF SERVER</u></td> </tr> <tr> <td><u>PR OF NEW PRODUCT</u></td> <td>04</td> <td>2001/08/21</td> <td>10:00</td> <td><u>COMPANY "B"</u></td> <td><u>KK BRANCH</u></td> <td><u>ONE SET OF LAN</u></td> </tr> <tr> <td><u>CREATE PROPOSAL</u></td> <td>07</td> <td>2001/08/21</td> <td>13:00</td> <td><u>COMPANY "C"</u></td> <td><u>LL BRANCH</u></td> <td><u>ONE SET OF SYSTEM</u></td> </tr> <tr> <td><u>PRESENT PROPOSAL</u></td> <td>07</td> <td>2001/08/23</td> <td>10:00</td> <td><u>COMPANY "A"</u></td> <td><u>JJ DEPT.</u></td> <td><u>ONE SET OF LAN</u></td> </tr> <tr> <td style="text-align: center;">: : : : : : :</td> <td style="text-align: center;">: : : : : : :</td> <td style="text-align: center;">: : : : : : :</td> <td style="text-align: center;">: : : : : : :</td> <td style="text-align: center;">: : : : : : :</td> <td style="text-align: center;">: : : : : : :</td> <td style="text-align: center;">: : : : : : :</td> </tr> </tbody> </table> </div>						DETAILS OF ACTIVITY	MATURITY STAGE	SCHEDULED DATE	TIME	CUSTOMER NAME	SECTION NAME	TRANSACTION TITLE	<u>CREATE PROPOSAL</u>	07	2001/08/20	10:00	<u>COMPANY "A"</u>	<u>JJ DEPT.</u>	<u>ONE SET OF LAN</u>	<u>PR OF NEW PRODUCT</u>	04	2001/08/20	15:00	<u>COMPANY "A"</u>	<u>JJ DEPT.</u>	<u>ONE SET OF SERVER</u>	<u>PR OF NEW PRODUCT</u>	04	2001/08/21	10:00	<u>COMPANY "B"</u>	<u>KK BRANCH</u>	<u>ONE SET OF LAN</u>	<u>CREATE PROPOSAL</u>	07	2001/08/21	13:00	<u>COMPANY "C"</u>	<u>LL BRANCH</u>	<u>ONE SET OF SYSTEM</u>	<u>PRESENT PROPOSAL</u>	07	2001/08/23	10:00	<u>COMPANY "A"</u>	<u>JJ DEPT.</u>	<u>ONE SET OF LAN</u>	: : : : : : :	: : : : : : :	: : : : : : :	: : : : : : :	: : : : : : :	: : : : : : :	: : : : : : :
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<div style="border: 1px solid black; border-radius: 15px; padding: 5px; display: inline-block;">REGISTER NEW TRANSACTION</div>																																																						

FIG.12


41	42	43	44	45	46
CUSTOMER	SECTION	STAFF	TRANSACTION	ACTIVITY	CALENDAR
	REGISTRATION OF ACTIVITY				
	CUSTOMER INFORMATION				
	CUSTOMER NAME		<div>121</div> <div>122</div>		
	SECTION NAME		<div>123</div>		
	TRANSACTION INFORMATION				
TRANSACTION TITLE					
ACTIVITY INFORMATION					
DETAILS OF ACTIVITY					
SCHEDULED DATE					
MATURITY					
<div>127</div> <div>COMPLETE INPUTTING</div>					

FIG.13


41	42	43	44	45	46
CUSTOMER	SECTION	STAFF	TRANSACTION	ACTIVITY	CALENDAR
<div style="display: flex; justify-content: space-between;"> <div style="width: 20%;">  </div> <div style="width: 80%;"> <p style="text-align: center;">REGISTRATION OF TRANSACTION</p> <div style="border: 1px dashed black; padding: 10px; margin-bottom: 10px;"> <p style="text-align: center;">131</p> <p style="text-align: center;">CUSTOMER INFORMATION</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>TRANSACTION</p> <p>TRANSACTION</p> <p>ACTIVITY</p> <p>MATURITY PLAN/HISTORY</p> <p>MATURITY ITEM</p> </div> <div style="width: 50%;"> <p>132</p> <p>CUSTOMER NAME</p> <p>133</p> <p>SECTION NAME</p> <p>COMPANY "B"</p> <p>KK BRANCH</p> </div> </div> </div> <div style="border: 1px dashed black; padding: 10px;"> <p style="text-align: center;">134</p> <p style="text-align: center;">TRANSACTION INFORMATION</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>135</p> <p>TRANSACTION TITLE</p> <p>136</p> <p>SALES STAFF NAME</p> <p>137</p> <p>DETAILS OF TRANSACTION</p> </div> <div style="width: 50%;"> <p>138</p> <p>COMPLETE INPUTTING</p> </div> </div> </div> </div> </div>					

FIG.14

CUSTOMER SECTION
STAFF TRANSACTION
ACTIVITY
CALENDAR

MONTHLY CALENDAR

▼

SALES STAFF NAME

141

CALENDAR

DAILY
WEEKLY
MONTHLY
ACTIVITY

142

AUGUST 2001

MON	TUE	WED	THURS	FRI	SAT/SUN
30	31	1	2	3	4/5
6	7	8	9	10	11/12
13	14	15	16	17	18/19
20 9:00 REGULAR MEETING 10:00 "A" / LAN- CREATE PROPOSAL 15:00 "A" / SERVER-PR FOR NEW PRODUCTS	21 10:00 "B" / LAN-PR FOR NEW PRODUCTS 13:00 "C" / SYSTEM- CREATE PROPOSAL	22	23 10:00 "A" / LAN- PRESENT PROPOSAL	24	25/25
27	28	29	30	31	1/2